Document Management

You can upload documents that support your assessment results. Do NOT upload any document that contains individually identifiable information.

In the Assessment tab, click on Document Management. If you have previously uploaded documents and marked them to remain active, they will appear on the page (1).

If you would like to upload a document, click on the Upload Document button (2). That will open up a new page for you to complete (see below).

3. You can browse your documents to find the file to be uploaded. When you find the file, click on it, the then click the "Open" button. That will populate 3 and 4. You will then see the format of the uploaded document (.pdf. .doc, etc.). Remember, there is a size limit (20MB); if you try to attach anything larger, you will get an error message.

5. You will provide a name of the document that will appear in the list (1). Be sure it is descriptive of the document and distinguishes it from other uploaded documents.

6. You may input a description of the document that provides more explanation. This is not a required field, but could be helpful to an external reader.

7. You will probably only have the current year visible in the Established in Cycle if you are adding a new document. You will also need to decide whether you want it to keep active into the next cycle or end in this cycle. Hit Save and Continue.

8. You will see a confirmation screen that you have successfully uploaded the document.

9. At that point, you can associate your document with a particular mission, goals, outcomes/objectives, measures/targets/ findings, action plans, and/or analysis questions entry. Don't forget to click the Save button.

10. You can decide to delete an uploaded file, by going to the main Document Management page and clicking on the trashcan icon (See page 1 of this document). You will need to agree to the disclaimer before you can permanently delete a file.